

General Information

Name: Hon Adam Botana

PID 287656

AGENCY INFORMATION

Organization	Suborganization	Title
House Of Representatives	Elected Constitutional Officer	State Representative

CANDIDATE FOR

Position	Agency Name	Position sought or held
State Representative	Florida House	District 80

Net WorthMy Net Worth as of June 7, 2024 was \$ 1,537,000.00.

Assets

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effect is \$ 41,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
22125 Seashore Cir, Estero FL 33928	\$ 450,000.00
27820 Forester Dr. Bonita Springs FL 34134	\$ 960,000.00
300 S,Duval St. Tallahassee FL 32301	\$ 325,000.00
Robert Baird 5811 Pelican Bay Blvd. Naples FL - ROTH IRA	\$ 102,904.74
FineMark Bank - Bank accounts	\$ 16,000.00
R.I.C. Concessions	\$ 80,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Ann Means	17203 Wrigley Cr, Ft Myers FL33908	\$ 278,000.00
Chase Bank	PO Box 650048 Dallas TX 75373	\$ 38,000.00
Omar & Sherry Botana	5124 Bonita Beach Rd, Bonita Springs FL 34134	\$ 27,000.00
TC Federal Bank	131 S. Dawson St. Thomasville GA, 31792	\$ 141,000.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

Training

This section applies only to a Constitutional or elected municipal officer, each of whom are required to complete annual ethics training pursuant to Section 112.3142, F.S.

- ☐ I certify that I have completed the required training under Section 112.3142, F.S.
- ☒ Required training under Section 112.3142, F.S., not applicable to filer for this form year.

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

Adam Botana

Digitally signed: 06/07/2024

Filed with COE: 06/07/2024

ACCOUNT WORKBOOK

Positions - All - Net Rows Only

Jun 07, 2024 03:55 PM EDT

Account Number:

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Account Information

BAIRD TRUST COMPANY TTEE FBO
ADAM BOTANA
ROTH IRA-ALIGN
5124 BONITA BEACH RD
BONITA SPGS FL 34134-3811

Contact Information

Other Phone: (239)248-0955
Email: ADAMBOTANA@YAHOO.COM
Birthdate: 04/27/1984 (40)

Details

Investment Objective: F - All Growth
Risk Tolerance: B - Moderate
MMF Code: IDL - IDL
Manager Name: ALL GROWTH
Plan Name: ALIGN HYBRID MODEL
Trusted Contact Ind: A - Available

Balances

Current Acct Value: 102,904.74
Prev Acct Value: 103,166.70
Today's Change: -261.96 (-0.25%)

Total Market Value: 101,487.51
Funds Available: 1,417.23
Cash Balance:
Margin Bal:
MMF Balance: 1,417.23
Fed Call:
Free Credit/
Miscellaneous Debit:

	Quantity	Security Description	Symbol	CUSIP	Mkt Price	Account Type	Loc	Value	Mgn
Σ								101,749.47	
1	369.4480	AMERICAN CENTURY ↗ EQUITY INCOME CL Y	AEIYX	02508F-81-0	8.8100	1	SKF	3,254.83	Yes
2	76.2920	EDGEWOOD ↗ GROWTH INSTL CL	EGFIX	0075W0-75-9	49.3400	1	SKF	3,764.24	Yes
3	376.3140	BLACKROCK ↗ HIGH YIELD BOND CL K	BRHYX	09260B-61-4	7.0400	1	SKF	2,649.25	Yes
4	468.7620	DWS ↗ RREEF REAL ASSETS INSTL CL	AAAZX	25159K-70-5	11.5600	1	SKF	5,418.88	Yes
5	92.8480	JOHN HANCOCK ↗ CLASSIC VALUE CL R6	JCVWX	409902-34-3	34.9100	1	SKF	3,241.32	Yes
6	51.1090	HARBOR ↗ SMALL CAP VALUE INSTL CL	HASCX	411511-84-3	39.7800	1	SKF	2,033.11	Yes
7	112.0810	OAKMARK ↗ INTL INSTL CL	OANIX	413838-72-3	27.2300	1	SKF	3,051.96	Yes
8	97.1920	HARTFORD ↗ DIVIDEND & GROWTH CL F	HDGFX	41664T-66-9	35.1900	1	SKF	3,420.18	Yes
9	20	ISHARES RUSSELL 2000 ETF	IWM	464287-65-5	203.5900	1	SEG	4,071.80	Yes

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	Quantity	Security Description	Symbol	CUSIP	Mkt Price	Account Type	Loc	Value	Mgn
Σ								101,749.47	
10	58	ISHARES RUSSELL 1000 VALUE ETF	IWD	464287-59-8	175.8200	1	SEG	10,197.56	Yes
11	32	ISHARES RUSSELL 1000 GROWTH ETF	IWF	464287-61-4	351.7300	1	SEG	11,255.36	Yes
12	89	ISHARES RUSSELL MID CAP ETF	IWR	464287-49-9	81.3500	1	SEG	7,240.15	Yes
13	136.1020	WCM - FOCUSED INTL GROWTH INSTL CL	WCMIX	461418-44-4	25.4100	1	SKF	3,458.35	Yes
14	139.7090	LOOMIS SAYLES - GROWTH CL Y	LSGRX	543487-11-0	26.6600	1	SKF	3,724.64	Yes
15	92.2470	MFS - INTL EQUITY CL R6	MIEIX	552966-80-6	35.6900	1	SKF	3,292.29	Yes
16	259.0320	NUANCE - MID CAP VALUE INSTL CL	NMVLX	56166Y-51-1	12.4700	1	SKF	3,230.12	Yes
17	137.7710	PEAR TREE - POLARIS FOREIGN VALUE INSTL CL	QFVIX	70472Q-80-7	24.2100	1	SKF	3,335.43	Yes
18	36.6660	T ROWE PRICE - GROWTH STOCK CL I	PRUFX	741479-40-6	101.4500	1	SKF	3,719.76	Yes
19	98.0810	PRINCIPAL - MID CAP CL R6	PMAQX	74256W-58-4	41.1500	1	SKF	4,036.03	Yes
20	251	VANGUARD FTSE DEVELOPED MKTS ETF	VEA	921943-85-8	51.1800	1	SEG	12,846.18	Yes
21	57.3250	VIRTUS - KAR SMALL CAP GROWTH CL I	PXSGX	92828N-59-3	31.7400	1	SKF	1,819.49	Yes
22	102.5380	ALLSPRING - EMERGING MARKETS EQUITY INSTL CL	EMGNX	94975P-75-1	26.2200	1	SKF	2,688.54	Yes

This valuation reflects securities and/or assets owned by you, as indicated on our records, resulting from transactions processed through Robert W. Baird and Co. Incorporated or supplemental information supplied by you. The securities or assets listed above may not represent actual holdings in your Baird account. Please refer to your Baird Client Statement to determine which securities are held in your Baird account. The information and prices displayed are derived from various sources we consider reliable, but may not represent actual market values. Estimated annual income and yields are calculated by annualizing recent distributions and do not reflect historical experience or predict future results. Certain types of securities could generate returns of principal or capital gains, which would cause the estimated income and yield amounts to be overstated.